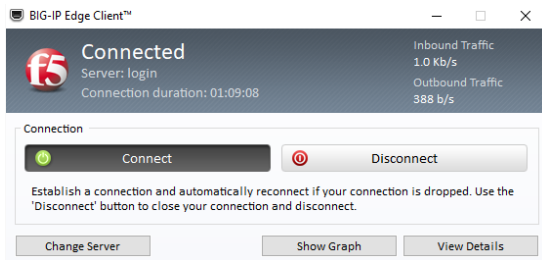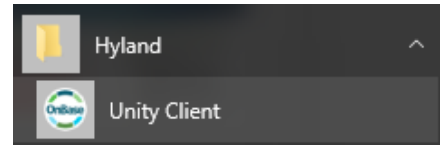# OnBase Unity Client Navigation & Personalization

Starting the OnBase Unity Client

1. **First** log into VPN (Big-IP Edge Client)

Launch the OnBase Unity Client from Start Menu under Programs

*Tip:* Save to your Start Menu or add to Taskbar

Accessing OnBase Unity Client through RDS *(for Mac and remote locations)*

If using OnBase with a Mac or outside the Dartmouth Secure network you will need to be setup with RDS (Remote Desktop Service)

➢ Dept Admin access for OnBase should be requested through Oracle Processing
➢ Email the Help Desk to be granted access to RDS
➢ If you are off-campus and outside Dartmouth Secure, Log into VPN: Big-IP Edge Client
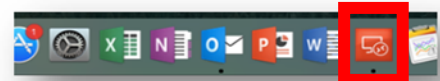
Accessing RDS on a PC:

➢ Go to: https://rds.dartmouth.edu
➢ Enter Dartmouth credentials
  • Kiewit/NetID
  • Password
➢ Click on OnBase Unity Client
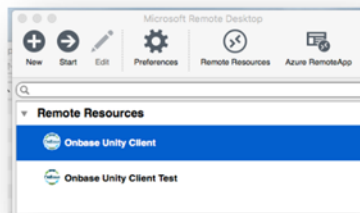
Accessing RDS on a Mac

Once RDS is install, OnBase can be accessed directly through the Microsoft Remote Desktop within the Applications, or the RDS application on the Application Ribbon

Once the Microsoft Remote Desktop opens, double-click on OnBase Unity Client and the OnBase Unity Client will launch.

For Instruction on installing RDS on your Mac, see *Connecting to Remote Desktop Services for Mac*

General Navigation

The OnBase Ribbon allows you to navigate the OnBase Unity Client between functional areas, such as, Custom Queries, Forms, and Workflow.

First time in OnBase

Unity Client users must make the following change the first time they open Unity:

• Select the green **File tab** (upper left)
• Select **User Options**
• Select **Workflow**
• **Uncheck** "Automatically select first item in the inbox"
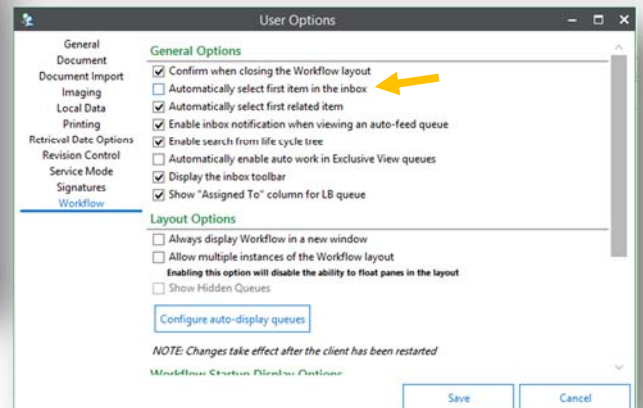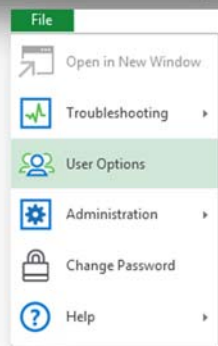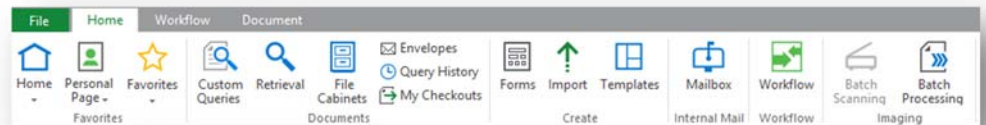
How important is this? If a Unity Client user does not uncheck this box, they will lock a request in the Queue causing a delay in processing. In fact, it is likely you will not be aware that the request has been locked!
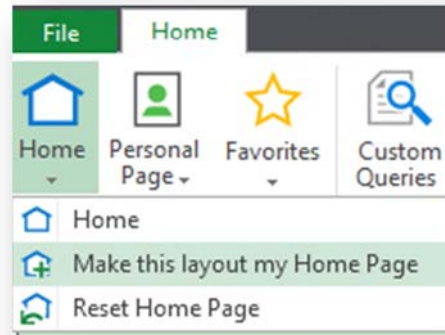
Personal Page

Setting the Personal Page as the Home Page

The Personal Page is a view that allows you to <u>save</u> and <u>access</u> frequently used Workflow Queues and Custom Queries

To access your Personal Page, click on the **Home tab** and click on **Personal Page**
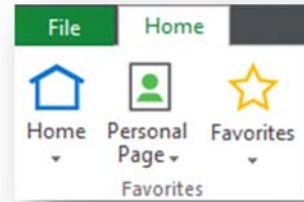
Set your **Personal Page** as your **Home** page by clicking on the **Home** drop down and selecting **Make this layout my Home Page**

Saving a Custom Query to the Personal Page

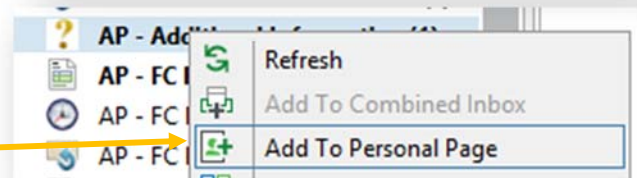To save a frequently used query:
1. Enter the query criteria
2. Run the query
3. Click the drop down on the query tab
4. Select **Add to Personal Page**
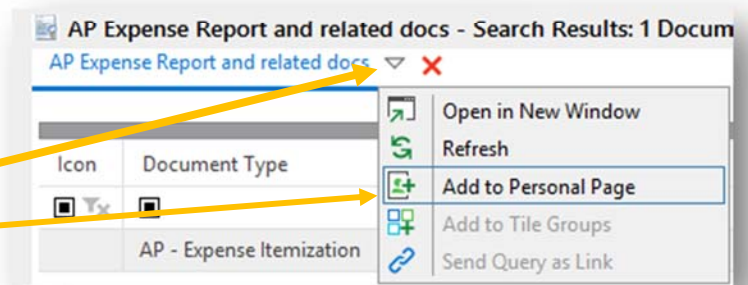
Saving a Workflow Queue to the Personal Page

To save a Workflow Queue, such as Additional Information or Pending Approval:
1. Right-click on the Queue
2. Select **Add to Personal Page**

Saving a Combined Inbox to the Personal Page

To save the Combined Inbox for multiple Workflow Queue, across multiple Life Cycles, such as all "Pending Approval":
1. Right-click on the Combined Inbox
2. Select **Configure Combined Inbox**
3. Select the queues you would like added to the Combined Inbox and click "OK" when done
4. Right-click again on the Combined Inbox
5. Select **Add to Personal Page**
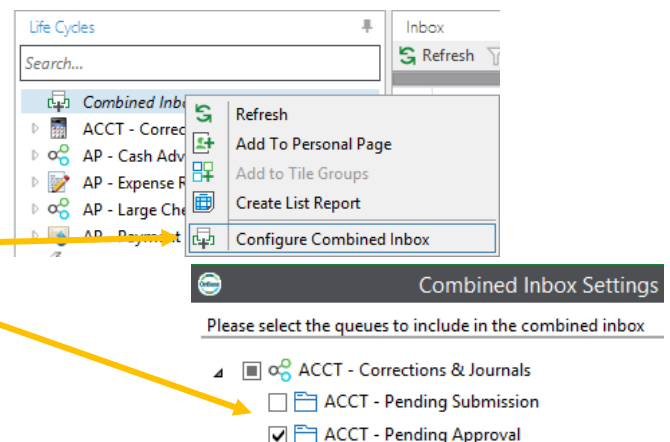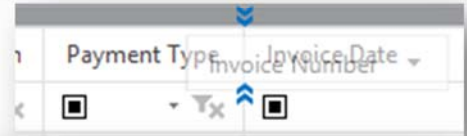
Workflow Queue Inbox and Custom Query Display

- Inbox: Column Headers
  - Resizing Columns
   - Columns can be resized by hovering over between columns and dragging the mouse left or right
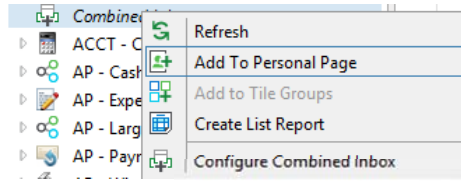
  - Column Display Order
    - Columns can be reorder by clicking and holding on column header and dragging it to the desired location

  - Grouping
    - Columns can be grouped to display items in a pivot format by clicking and holding the column header and dragging it to the grey bar above column headers to expose a group by area bar
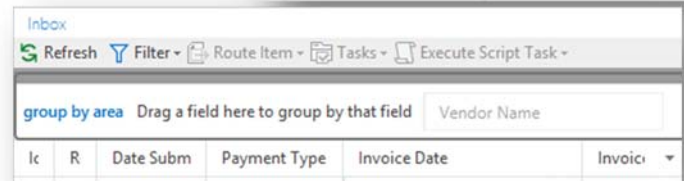
    - To remove grouping, click and drag the group by header and drag it down to below the headers in the body of the window
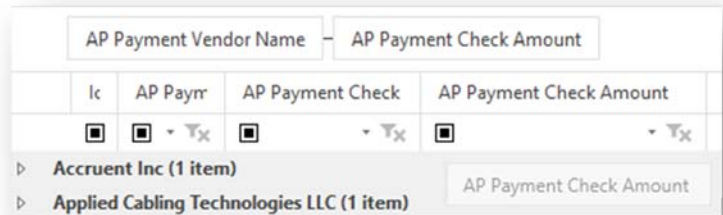
  - Sorting
    - Column data can be sorted by clicking on the column header to sort smallest to greatest and greatest to smallest
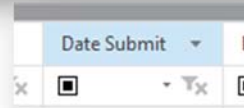
  - Filtering
    - Below each column header is a textbox that that allows type and search or use the drop down to further narrow column data.
    - By clicking on the "Contains" black box, one can filter based on different functions.
    - By continuing to add additional filters to multiple Column headers, the user can further narrow the items displayed within the Inbox
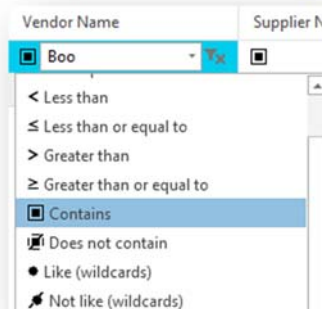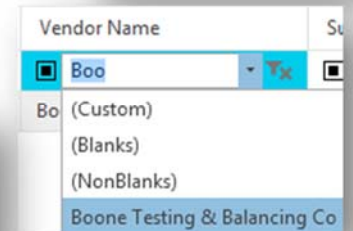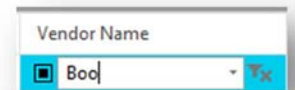
Custom Queries

Use Custom Queries to find an eform:

- ➢ 'Custom Queries' is located under the "Home" tab
- ➢ Click on 'Finance General Request and Related Documents'
- ➢ Enter your search criteria in the Query fields
- ➢ Click 'Search' to run your query.

Helpful Hints:
- ▪ Use the asterisks "*" as the wildcard (e.g. Wallace*)
- ▪ Double-click on the Query field, to get duplicate fields to search multiple criteria (i.e. range of dates)
- ▪ Formula operators are available at the end of query fields to allow fine tuning the query (>= 12/1/2015 <= 1/1/2016)
    - ▪ =   Equal
    - ▪ <>   Does not contain
    - ▪ >   Greater than
    - ▪ <   Less than
    - ▪ >=   Greater than or equal
    - ▪ <=   Less than or equal
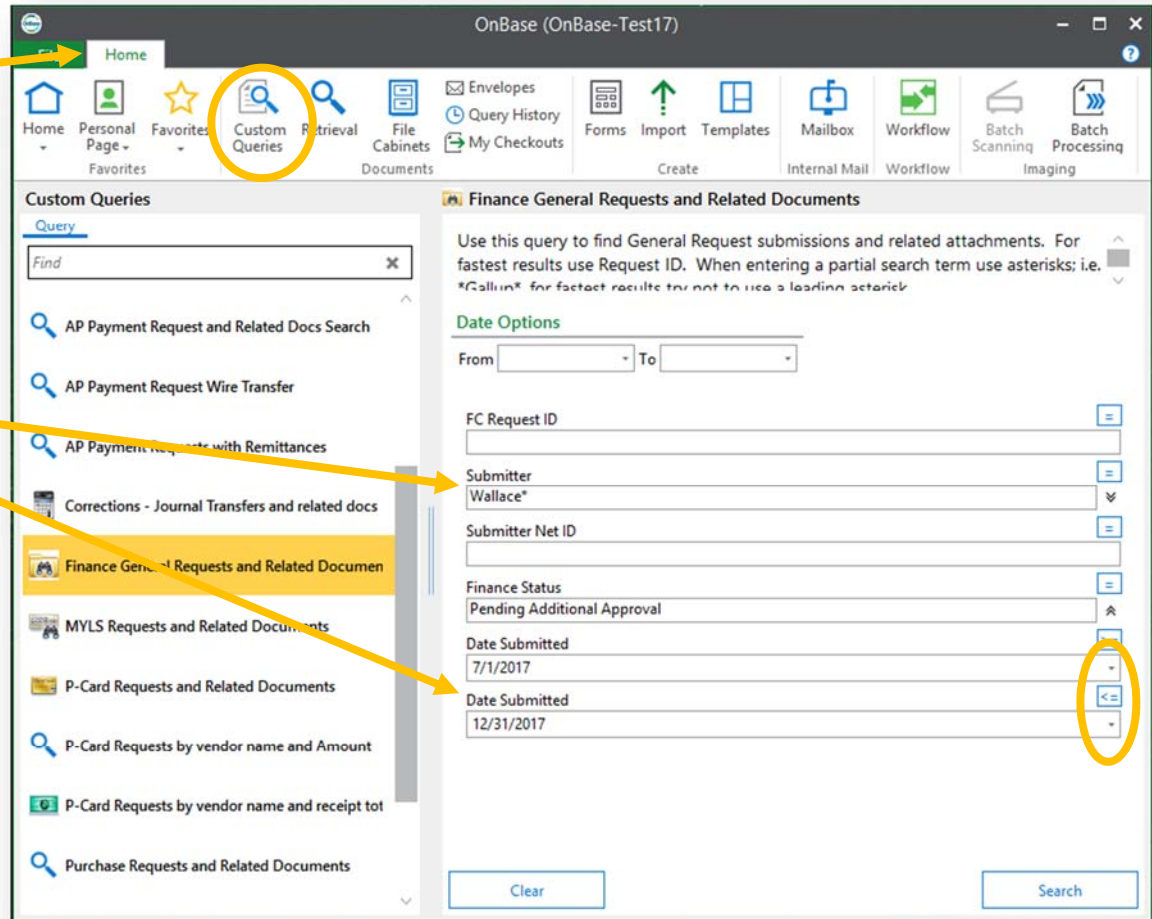
Use Filters to refine your search

The Column Box indicate additional formula function

Column Filters allow for addition refining

Click on the ⮇ Document Viewer at the bottom left of the screen to view documents
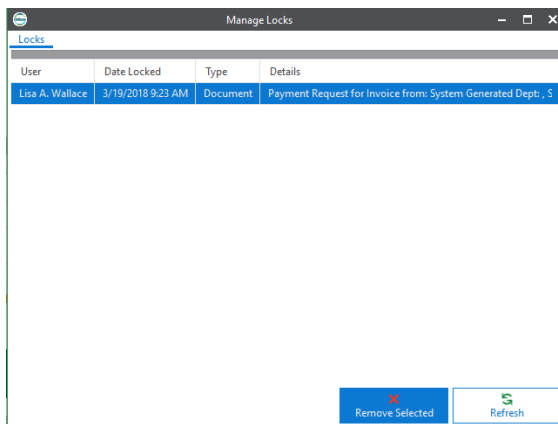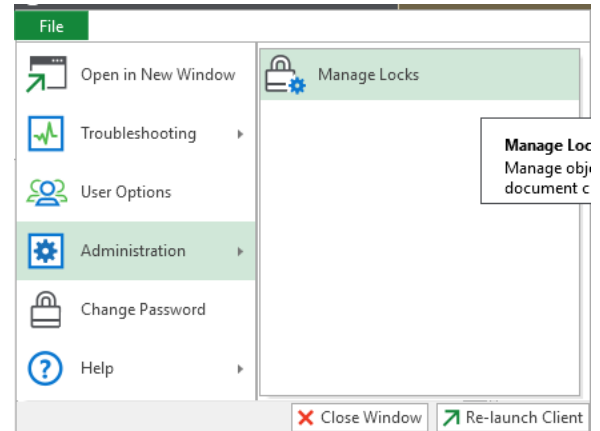
Unlock a Request

Locked a Request? It happens and it is usually unintentional**.**

- If a request is locked, a message will appear stating that the record is locked and will provide the name of the individual that has the item locked
- You may also notice in the upper-right hand corner of the request a lock and if you hover

Document is read-only and cannot be modified.
The document is read-only because it is being modified by Lisa A. Wallace
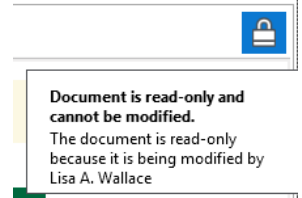
If you have an item locked….

1. Select the **File menu**
2. Select **Administration**
3. Select **Manage Locks**
4. A pop up window will appear
   a) **Select the request** in the list to highlight the request
   b) Select **Remove Selected**

File		
Open in New Window	Manage Locks	
Troubleshooting		
User Options		Manage Loc
Administration		Manage obj document c
Change Password		
Help		
	✕ Close Window	↗ Re-launch Client

Manage Locks

User	Date Locked	Type	Details
Lisa A. Wallace	3/19/2018 9:23 AM	Document	Payment Request for Invoice from: System Generated Dept:, S

Remove Selected   Refresh

Exiting OnBase

To prevent exception errors and unintentionally locking items, we encourage you to always Exit OnBase, particularly if you use a laptop and frequently move between one location and another. Depending on if you are using the Unity Desktop client or RDS, you will have different methods of doing this.

Logging off at the System Tray:

1. Click the up arrow
2. Locate and right-click on the OnBase icon
3. Click on "Exit OnBase"

OnBase

	Launch Unity Client
→]	Log Out
✕	Exit OnBase

5:57 AM
1/25/2018